APPLICATION

FOR

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TITLE: SERVICES INTEGRATION

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Services Integration

CROSS REFERENCE TO RELATED APPLICATIONS

This application claims priority to U.S. Provisional Application entitled "ENTERPRISE CHANGE PLANNING AND EXECUTION," filed on March 14, 2003, Application Serial No. 60/455,087.

5 **BACKGROUND**

During an organizational restructuring, such as a merger or acquisition, an organization needs to determine how to effectively serve current customers. In order to obtain one or more restructuring goals, organizations often desire to share

10 customer information and resources to reduce the risk of unwanted redundant customer services and support. Moreover, organizations want to ensure that customer concerns are addressed in the restructuring process.

SUMMARY

15 The present application describes systems, methods and software for enterprise change, such as mergers & acquisitions (M&As), for one or more organizations.

In an aspect, the invention features a method for managing a corporate restructuring of at least two organizations

20 including presenting a user interface including information relating to consolidating customer accounts for at least one of the restructuring organizations, and presenting a template in

the user interface, the template including a rollout template menu, a pull down window, a list of action items, and a status relating to each action item in the list.

In embodiments, the list of action items can include at
5 least one of an account executive assignment notification, an account executive personalized communication, a customer communication, a cross selling opportunity, and a retention plan, an action including a transmission of an email.

In another aspect, the invention features a method
10 including providing a single logical physically distributed information system across one or more information systems of at least two enterprises being combined, and providing a user interface to allow a user to access the single logical physically distributed information system to execute one or more
15 pre-merger activities, merger activities, and post-merger activities, the merger activities including customer-related integration and resources, the post-merger activities including a post-merger assessment and a measurement of one or more achieved merger synergies.

20 In embodiments, the merger activities can include providing customer-related communications, and managing and planning customer support activities, the customer support activities including addressing one or more customer issues and concerns. The user interfaces can be adapted to a role of the user and a

phase of the merger, the user role including an executive of one or more customer accounts, a security of the user interface related to the phase of the merger and a role of the user.

In another aspect, the invention features a method including facilitating consolidation of customer-related information for a first organization being merged with a second organization, the customer-related information including customer accounts, the consolidation including matching one or more customer accounts of the organizations, and facilitating consolidation of customer-related assignments of at least one of the organizations.

In embodiments, the method can include providing an exception list for non-matched customer accounts, and tracking a status of customer-related engagements.

In another aspect, the invention features a system for managing a merger of at least two organizations, wherein the system can include a software process and user interface adapted to assist customer satisfaction during a merger period, the software process being stored in a medium.

In embodiments, the system can include a first tool adapted to retain one or more customers, a second tool adapted to provide collaborative customer retention planning, and/or a third tool to provide targeted and personalized electronic mailing to customers of at least one of the organization. The

second tool can be adapted to provide a unified and aligned

presentation of customer accounts from one or more merger

customer support centers of at least one of the organizations,

the presentation including customer records.

5   In another aspect, the invention features a system for

implementing a merger of at least two organizations, the system

including a software product adapted to facilitate sales-related

activities of the organizations, the software product including

a user interface, wherein the sales-related activities including

10   at least one of sales consolidation, cross selling activities,

and customer retention of the organizations.

In embodiments, the user interface presents at least one of

a synergy, an expected impact, a realized impact, and a progress

of the expected impact, the user interface presents the progress

15   in a graph and at least one of an owner of the synergy, an

electronic mailing link, and one or more initiatives related to

the synergy. The user interface presents information for one or

more user-identified cross selling opportunities, the

information including a number of matched customer accounts, a

20   status, and a potential value, the potential value associated

with an external object. The user interface can include a first

panel adapted to address customer-related issues, a second panel

adapted to address sales-related initiatives, the second panel

including at least one of an approval button, a rejection

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button, a checklist of initiatives, a number of impacted

customers, a financial impact, an initiative owner, and an

initiative priority level, a third panel adapted to facilitate

customer retention, the third panel including a measure of

5   customer retention, one or more retention rates, and a movement

of the one or more rates, a fourth panel adapted to facilitate

customer retention, the fourth panel including at least one of a

customer satisfaction rate, a customer survey, and a movement of

the rate, wherein the customer survey can include one or more

10   external objects, and/or a fifth panel adapted to facilitate a

search of merger information and to facilitate contacting one or

more merger members.

    In another aspect, the invention features a system for

managing a merger of at least two organizations, the system

15   including a graphical user interface adapted to allow a user to

consolidate customer accounts for at least one of the

organizations, the graphical user interface further adapted to

match customer accounts from at least two merger organizations.

    In embodiments, the graphical user interface can include a

20   sorted list of customer accounts, a customer account value, a

numerical representation of account ranking, information for at

least one customer service personnel from each merger

organization, information for a customer service personnel

assignment relating to at least one account, the customer

service personnel assignment including a cooperative assignment. The graphical user interface can also include information relating non-matched accounts and a clean room tool adapted for at least one stakeholder, the information relating to non-

5   matched accounts including a second list of customer accounts.

In another aspect, the invention features a method for managing a merger of at least two organizations including presenting a user interface including information relating to consolidating accounts for at least one of the merger

10   organizations, the user interface including a pull down window, a text box a trigger date, and a response date, and presenting a template in the user interface, the template including a notification template menu, a list of action items, and an owner relating to each action item in the list.

15   In embodiments, the list of action items can include at least one of an account executive assignment notification, an account executive personalized communication, a customer communication, a cross selling opportunity, and a retention plan, an action item includes transmission of an email.

20   The method can also include facilitating exception handling for at least one of the action items. The user interface can present at least one of a list and a graph, the graph presents a time period for each listed action.

In another aspect, the invention features a system for managing a merger of at least two organizations including a services unification module, the services unification module including one or more user roles, the user roles including at

5   least one of customers, services taskforce members, service representatives, and integration project managers.

In embodiments, the services unification module can include one or more inputs, the inputs including a list of customer accounts, a list of products sold to one or more customers, a

10   list of customer-related services, a list of customer-related personnel, and a list of service providers. The services unification module further can include one or more outputs, the outputs including an account services consolidation plan, a merged account repository, a customer communication, a tracking

15   statistic, and a customer-satisfaction statistic.

Details of one or more implementations are set forth in the accompanying drawings and the description below. Other features and advantages can be apparent from the description, drawings, and claims.

20   **BRIEF DESCRIPTION OF THE DRAWINGS**

These and other aspects will now be described in detail with reference to the following drawings.

FIG. 1 is a block diagram of a system.

FIG. 2 is a flow diagram.

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FIG. 3 is a block diagram of an architecture.

FIG. 4 is a block diagram of a platform.

FIGS. 5-12 illustrate exemplary user interfaces.

Like reference symbols in the various drawings indicate

5   like elements.

DETAILED DESCRIPTION

As shown in FIG. 1, a system 10 includes a processor 12 and

a memory 14. Memory 14 includes an operating system 16, and

10   instructions 18, that when executed by the processor 12, perform

an exemplary restructuring integration process 100, described

below. A specific restructuring process, referred to as a

merger and acquisition (M&A), will be used as an example

throughout this description. However, the process 100 can be

15   applied to most corporate change or restructuring activities,

such as spin-offs, department mergers and splits, and so forth.

Memory 14 also includes common restructuring business processes

modules 200, application logic 300, and a core framework of

services 400 that support the restructuring integration process

20   100. The system 10 includes a link to a storage device 20 and

an input/output device 22. The input/output device 22 can

include a graphical user interface (GUI) 24 for display to a

user 26.

The system 10 includes a link to a network 28. Network 28 links the system 10 to other systems 30 within a single entity and to systems 32 in one or more other entities. Systems 30, 32, generally referred to as clients or source systems, access

5 data through a portal 34. Systems 10, 30, 32 are designed to act as a single logical physically distributed information system representing multiple enterprise information systems of organizations residing in the systems 30, 32. Information is exchanged between the system 10 and systems 30, 32 through the

10 portal 34 and through user interfaces (UIs) of an architecture, described below.

As used herein, the terms "electronic document" and "document" mean a set of electronic data, including both electronic data stored in a file and electronic data received

15 over a network.

The term "organization" refers to a company, enterprise, business, government, educational institution, or the like. The term "organization" can also refer to a group of persons, such as an association or society.

20 An "enterprise change" or "organization change" refers to a merger, an acquisition, a combination of a merger and acquisition or some other type of change in an organization's structure, leadership, governance, personnel, business, direction, purpose, strategy, and so forth.

A "synergy" is a value, performance or effect that can be achieved as resources of two organizations combined will be greater than the sum of the separate individual resources. The term "synergy" can also refer to cooperative interaction among

5 groups, especially among the acquired subsidiaries or merged parts of an organization, which creates an enhanced combined effect.

The term "object" refers to information sources such as documents, reports, presentations, files and directories.

10 The system described herein can use software and structures available from SAP AG of Walldorf, Germany. Instead of or in addition to SAP AG software, the system can coexist or operate with software and systems that are not provided by SAP AG. For example, the disclosed software can include a hierarchal

15 software framework to work seamlessly with other software tools such as Excel® made by Microsoft Corporation of Redmond, Washington.

The processes for merger members can include an intranet template for employees. In general, a "template" in the merger

20 process is an interface that can include parameters or a format from a previous merger, or can be transferred or copied from another employee in the same organization or a customer.

"Stakeholders" are exemplary merger members described herein with an interest or stake in the progress of the merger,

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or persons who are involved in some aspect of the merger or its effects.

A "deliverable" is referred to as a "task" that one or more stakeholders are responsible for producing for other

5   stakeholders. A deliverable can be referred to as a goal, objective, result or procedure that can be fulfilled, promised, achieved, produced or expected. A deliverable can also be referred to as a merger-related project.

Due diligence involves investigation and examination into

10   one or more details of a potential investment, such as an examination of operations and management and a verification of material facts. Due diligence can serve to confirm material facts regarding a merger or offer, such as reviewing financial records and other items deemed material to the merger.

15   As shown in FIG. 2, the restructuring integration process 100 includes a deal selection process 102. The deal selection process 102 defines acquisition objectives and strategies. The deal selection process 102 searches for the best fit target company to meet a set of objectives and manages detailed due

20   diligence on the target company. The deal selection process 102 also identifies synergies, risks and a realization plan for acquiring the target company.

A transaction execution process 104 structures an acquisition in terms of type, tax implications, legal issues and

so forth. The transaction execution process 104 closes an acquisition deal and provides for a rollback in the event the acquisition deal fails.

An integration planning process 106 provides a plan for
5 short term and long term tasks of acquisition integration and communicates goals and decisions to all stakeholders.

The restructuring integration process 100 includes an integration execution process 108. The integration execution process 108 manages an integration project and it sub-projects,
10 designs a new organization, and minimizes disruptions to customers by rolling out combined field organizations quickly. The integration execution process 108 manages the integration of information technology (IT), human resources (HR), financials and procurement. The integration execution process 108 provides
15 for the retention of key employees, manages field organization integration, and identifies cross-selling opportunities and rolls the opportunities out. The integration execution process 108 manages stakeholders, tracks an acquisition, and reports issues and successes.

20 The restructuring integration process 100 includes a post-integration assessment process 110. The post-integration assessment process 110 measures achieved synergies against targets, accesses where improvements can be made in synergy

estimation and/or in integration execution, and applies history to a next transaction.

An enterprise change (e.g., merger or acquisition) is facilitated by treating two or more information systems as a

5   single logical information system to execute pre-change (e.g., pre-deal, pre-closing or pre-merger) due diligence and post-change (e.g., post-deal, post-merger or post-closing) integration of the enterprise change (e.g., merger or acquisition).

10   As shown in FIG. 3, the restructuring integration process 100, common restructuring business processes modules 200, application logic 300, and core framework of services 400 are designed to conform to an architecture 500 designed to a platform 600 that represents a single logical physically

15   distributed information system representing multiple enterprise information systems of organizations. The architecture 500 / platform 600 insure consistency of data exchange between system 10 and source systems 30, 32, and a separation of source systems 30, 32, when appropriate during phases of the restructuring

20   integration process 100.

The single logical physically distributed information system architecture 500 representing multiple enterprise information systems of organizations includes multiple clients 502 accessing data over a network 504 through a portal 506. In

one embodiment, the clients 502 are processes and/or web browsers that are coupled to the network 504 through a proxy server (not shown).

5 The portal 506 provides a common interface to program management services through user interface (UI) components 508. The portal 506 receives requests from the clients 502 and generates information views (iViews) 510, such as web pages, in response. In embodiments, the portal 506 implements a user roles-based system to personalize a common interface and the 10 iViews 510 for a user of one of the clients 502. The user can have one or more associated roles that allow personalized tailoring of a presented interface through the iViews 510.

The portal 506 communicates with an enterprise management system 512 that consolidates multiple application services.

15 The portal 506 receives data 514 from the system 512 to fulfill the requests of the clients 502. The system 512 provides integrated application services to manage business objects and processes in a business enterprise. The business objects and processes include resources such as personnel, 20 development projects, business programs, inventories, clients, accounts, business products, business services and so forth.

The system 512 communicates with enterprise base systems 516 to obtain multiple types of enterprise base system data 518. The base systems 516 include application services, such as human

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resource management systems, customer relationship management services, financial management systems, project management systems, knowledge management systems, business warehouse systems, time management systems, electronic file systems and

5   mail systems. In embodiments, the enterprise base systems 516 include a single integration tool, such as eXchange from SAP AG of Germany, which provides an additional level of integration among the enterprise base systems 516. The enterprise management system 512 consolidates and integrates data and

10   functionality of the enterprise base systems 516 into the single management tool.

The single management tool includes systems and methods to facilitate generation of new applications within the enterprise management system 512. The new applications, generally referred

15   to as cross-functional or composite applications, draw on resources of the enterprise base systems 516 to cross over traditional application boundaries and handle new business scenarios in a flexible and dynamic manner.

A virtual business cycle can be generated using such

20   composite applications, where executive level business strategy can feed management level operational planning, which in turn can feed employee level execution, which can feed management level evaluation, which can feed executive level enterprise strategy. Information generated in each of these stages in an

enterprise management cycle can be consolidated and presented by

the enterprise management system 512 using the customized cross-

functional applications. The stages provide and consume

determined services that are integrated across multiple

5   disparate platforms.

The portal 506, enterprise management system 512 and

enterprise base systems 516 can reside on one or more

programmable machines, which communicate over the network 504 or

one or more communication busses. In embodiments, the base

10   systems 516 reside in multiple servers connected to the network

504, and the portal 506 and enterprise management system 512

reside in a server connected to a public network (not shown).

Thus, the architecture 500 can include customized, web-based,

cross-functional applications, and a user can access and manage

15   enterprise programs and resources using these customized web-

based, cross-functional applications from anywhere that access

to the public network is available.

A user interface (UI) provides UI patterns used to link new

objects and workflow together and generate standardized views

20   into results generated by one or more cross-functional

applications.

An object modeling tool enables generation of new business

objects in a persistency/repository layer by providing a

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mechanism to extend a data object model dynamically according to the needs of an enterprise.

A process modeling tool enables generation of new business workflow and ad hoc collaborative workflow. The process

5   modeling tool includes procedure templates with pre-configured work procedures that reflect best practices of achieving a work objective. A work procedure can include contributions from several individuals, generation of multiple deliverables, and milestones/phases. Whenever an instantiated business object or

10   work procedure has a lifetime and status, a progress and status of the object or work procedure is trackable by a process owner or by involved contributors using a "dashboard" that displays highly aggregated data. The dashboard and a "myOngoingWork place" can be two UI patterns that are provided by the UI

15   components 508.

Whenever there is a concept of "myObjects," "myRecentObjects," "myRelatedObjects" or "myPreferredObjects," then an object picker UI pattern, provided by the UI components 508, is included that lets users pick their favorite object

20   directly. Whenever people are to be searched, either for choosing one individual person or for generating a collection of people meeting some criterion, a "People Finder" concept can be applied. A key aspect of searching for a person is described as an attribute within the user's activity, qualification,

interest, and collaboration profile. For a given cross-functional application, people collections can be stored as personal or shared collections using the People Finder to make them available for further operations later on.

5   Whenever there is a strategic view on a cross-functional application scenario, analytics of the overall portfolio can be made available in the form of a collection of the UI components 508. A view selector is used to display/hide components, and a component can be toggled between graphical and numerical display

10   and include a drop-down list or menu to select sub-categories or different views.

Cross-functional application scenarios provide related information to the user when possible, and some parts within a larger cross-functional application define what kind of related

15   information is to be offered. Heuristics can be used to identify such relatedness, such as follows: (1) information that is related to the user due to explicit collaborative relationships, such as team/project membership or community membership; (2) information that is similar to a given business

20   object in a semantic space based on text retrieval and extraction techniques; (3) recent objects/procedures of a user; (4) other people doing the same or similar activity (using the same object or procedure template, having the same work set); (5) instances of the same object class; (6) next abstract or

next detailed class; (7) explicit relationships on the
organizational or project structure; (8) proximity on the time
scale; (9) information about the underlying business context;
and/or (10) information about the people involved in a

5   collaborative process.

Cross-functional applications also can include generic
functionality in the form of "Control Center Pages" that
represent generic personal resources for each user. These
cross-functional applications can refer to the following pages,

10   where appropriate: (1) A "MyOngoingWork" page that provides
instant access to all dashboards that let users track their
ongoing work. Ongoing work refers to the state of business
objects as well as guided procedures. (2) A "MyDay" page that
lists today's time based events that are assigned or related to

15   the user. (3) "MyMessageCenter" page that displays all pushed
messages and work triggers using a universal inbox paradigm with
user selected categorical filters. (4) "MyInfo" that provides
access to all personal information collections (documents,
business objects, contacts) including those located in shared

20   folders of teams and communities of which the user is a member.
MyInfo can also provide targeted search in collaborative
information spaces such as team rooms, department home pages,
project resource pages, community sites, and/or personal guru
pages.

The object modeling tool, process modeling tool and user interfaces are used to build components of cross-functional applications to implement new enterprise management functions without requiring detail coding development by a system

5　architect or programmer.

As shown in FIG. 4, a platform 600 that supports the architecture 500 includes a portal 602, user interface (UI) components 604 and application services logic 606. The platform 600 includes an object access layer 608, a

10　persistence/repository layer 610, connectivity layer 612, and source systems 614. In embodiments, the architecture includes software and components from SAP AG of Germany, as well as special corporate restructuring modules.

Graphical user interfaces (GUIs) provide interaction

15　between a user and the UI components 604 through the portal 602. The UI components 604 interact with the application services logic 606. The application services logic 606 interact with databases and repositories in the persistence/repository layer 610. The user requests information via a GUI through the portal

20　602. The application services logic 606 processes the user request, retrieves the appropriate requested information from the databases and repositories in the persistence/repository layer 610, and sends the requested information to GUI for display to the user.

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The databases and repositories in the

persistence/repository layer 610 can contain metadata. Metadata

refers to data that describes other data, such as data

pertaining to roles, work sets and personalization information,

5   for example. The metadata can interact with the object access

layer 608, connectivity layer 612 and application services logic

606. The metadata can also interact with templates 616. The

templates 616 provide a format or organization of information

according to preset conditions. The templates 616 can interface

10   with Web application server (WAS) processes 618 and core merger

processes 620 in the repository layer 610.

In embodiments, the databases and repositories in the

persistence/repository layer 610 interact with the source

systems 614 through base system connectors 615 using a markup

15   language such as extensible markup language (XML), web services

such as Simple Object Access Protocol (SOAP), request for

comments (RPC), or Transmission Control Protocol/Internet

Protocol (TCP/IP). The source systems of one organization can

interact with the source systems of another organization through

20   a firewall 617.

The base system connectors 615 can include a enterprise

connector (BC) interface, Internet communication

manager/Internet communications framework (ICM/ICF), an

encapsulated postscript (EPS) interface and/or other interfaces that provide remote function call (RFC) capability.

The persistence/repository layer 610 provides the platform 600 with its own database and data object model. The database

5   and data object model provides a consolidated knowledge base to support multiple enterprise functions, including functions generated as cross-applications. Active communication between the persistence/repository layer 610 and the base systems 516/614 provides a linkage between real time relational data

10   from multiple base systems 516/614 and an integrated enterprise tool to permit strategic enterprise management and planning.

The data object model represents a subset of data objects managed by base systems 516/614. Not all of the data aspects tracked in the base systems 516/614 need to be recorded in the

15   data object model. The data object model has defined relationships with data objects stored in the base systems 516/614. For example, certain data objects in the data object model have "read-only" or "write-only" relationships with data objects in the base systems 516/614. These types of defined

20   relationships are enforced through a communication process between the persistence/ repository layer 610 and the base systems 516/614. The persistence/repository layer 610 decouples application development from the underlying base systems 516/614.

In embodiments, the source systems 516/614 interact with third party applications, such as Lotus software from IBM or data provided by other content providers, such as Yahoo!

5   As described above, the portal 602 provides a common interface to management services. The management services include a merger project management service and a merger integration project management service. The network 504 links the clients 502 to the portal 602 for exchange of information pertaining to a merger of two organization organizations or an

10   acquisition involving two organizations.

To provide for interaction with a user, embodiments of the invention can be implemented on a computer having a display device, e.g., a CRT (cathode ray tube) or LCD (liquid crystal display) monitor, for displaying information to the user and a

15   keyboard and a pointing device, e.g., a mouse or a trackball, by which the user can provide input to the computer. Other kinds of devices can be used to provide for interaction with a user as well; for example, feedback provided to the user can be any form of sensory feedback, e.g., visual feedback, auditory feedback,

20   or tactile feedback; and input from the user can be received in any form, including acoustic, speech, or tactile input.

Embodiments of the invention can be implemented in a computing system that includes a back-end component, e.g., as a data server, or that includes a middleware component, e.g., an

application server, or that includes a front-end component, e.g., a client computer having a graphical user interface or a Web browser through which a user can interact with an implementation of the invention, or any combination of such

5   back-end, middleware, or front-end components. The components of the system can be interconnected by any form or medium of digital data communication, e.g., a communication network. Examples of communication networks include a local area network ("LAN") and a wide area network ("WAN"), e.g., the Internet.

10 The computing system can include clients and servers. A client and server are generally remote from each other and typically interact through a communication network. The relationship of client and server arises by virtue of computer programs running on the respective computers and having a

15 client-server relationship to each other.

FIG. 5 shows an example of an interface 1200 for a stakeholder 1202 with access to a sales task force menu 1208. Other possible views for stakeholders in the sales task force interface 1200 include views for sales integration, file

20 sharing, discussions, deliverables, and a calendar. The view presented in interface 1200 is a transition cockpit view 1215. The view 1215 allows the stakeholder 1202 to access and manage sales-related transition tools for the merger, including an account transition rollout 1220 and sales synergy tracking 1230.

The account transition rollout 1220 presents graphs 1221 and charts 1223 of accounting information, including regional or divisional account information 1224 and accounts 1223 that are slipping from schedule.

5   The system 10 facilitates sales channel consolidation 1240 in the sales synergy tracking section 1230. The section 1230 can present a synergy 1232, an expected impact 1234, a realized impact 1235, and a progress 1236 of the expected impact. The expected impact progress 1236 is displayed as a percentage in a

10   bar graph. The section 1230 can also show an owner 1238 of a synergy, along with a link for an email 1241 and a real-time messaging and availability utility 1242. Also, the section 1230 can present one or more initiatives 1239 related to the synergy 1232.

15   The availability feature or utility 1242 allows a stakeholder to send a private, real-time message to another user on the system 10. The availability utility 1242 can be a real-time alternative to email and allow a chat session outside of a chat room. The utility 1242 can be made by an external software

20   tool from a unit of AOL Time Warner Inc. of New York, New York.

Interface 1200 further presents a panel 1245 to allow a user 1202 to view and analyze one or more user-identified cross selling opportunities. One or more stakeholders can identify one or more cross-selling opportunities 1246. The panel 1245

presents one or more opportunities 1246 and a number of accounts

matched 1247 for each opportunity. A status 1249 and a

potential value 1248 of each opportunity are evaluated and

presented in a linked object 1248A.

5   The linked object 1248A can be an external software object,

such as an Excel® spreadsheet by Microsoft Corporation. In

general, objects can be internal or external to the disclosed

software, but can coexist with each other.

        FIG. 5 and FIG. 5A present an exemplary panel 1250 for

10   issues or feedback 1252 from customers or other merger

stakeholders. The feedback 1252 arrives from stakeholders who

sell or market products or services to customers and includes a

corresponding priority level 1254. The feedback 1252 provides

the merger organizations with valuable information on marketing,

15   selling, and advertising products and services. The feedback

1252 also allows a merger organization to identify strengths and

weaknesses in organizational products, services, strategy,

personnel, and goals during the merger process 1100. Moreover,

the feedback 1252 allows merger organizations to track customer

20   reactions to merger developments and announcements.

        FIG. 5A further presents a panel 1260 for sales-related

initiatives for approval from a stakeholder. The panel 1260

present buttons for approval 1261 and rejection 1262. The panel

1260 presents a checklist of initiatives 1263 with a number of

impacted customers 1264, a financial impact 1265, an owner 1266

and a priority level 1267 for each initiative 1263. The

interface 1200 can present a panel 1270 for each merger

organization with a measure of customer retention 1272. The

5   panel 1270 can present one or more retention rates 1271 for a

division or region 1274, 1276, 1278. Alternatively, the

interface 1200 presents customer satisfaction rates 1271,

including customer surveys 1273. The customer survey 1273 is

presented in an external object. Moreover, the panel 1270

10   indicates if there has been any movement (via an arrow) 1279 of

the rates 1271 (e.g., increasing or decreasing rates 1271).

Furthermore, the interface 1200 has a panel 1290 with a

text box 1291 to allow the user 1202 to search for items or

people, as well as to perform a number 1294 of other actions

15   1293. The user 1202 can contact a number 1298 of merger team

members 1296.

As shown in Figs. 6-10 the system 10 includes a graphical

user interface and can be adapted to consolidate customer

accounts for at least one of the organizations.

20   FIG. 6 presents an interface 1300 to allow the user 1202 to

consolidate customer accounts 1315 from the sales task force

menu 1208. The interface 1300 presents an account profile 1320

of a merger organization 1330 and sort a list 1333 of customer

accounts 1332 based on one or more predefined parameters in a

pull down menu 1323. The interface 1300 identifies and matches

similar accounts 1332, 1343 from at least two merger

organizations 1330, 1340. The interface 1300 presents a value

1334 of each account 1332 for a number 1345 of accounts, and

5   sort accounts 1332 by account values 1334.

Customer service personnel 1336, 1346 from each merger

organization 1330, 1343 can be presented, and an assignment 1347

made for the person responsible for the account. For instance,

Joe Dylan 1338 from Speedial, Inc. 1330 and Allen Maxwell 1348

10   from Marine Systems 1340 have a cooperative assignment 1341 for

a West Marine Inc. account 1339. Alternatively, either executive

1336, 1346 from the merger organizations 1330, 1340 can

individually be assigned to be responsible for a customer

account 1332. When the customer names 1337, 1342 do not

15   completely match, the user 1202 is allowed to manually select a

customer from a list for exception listing. The user 1202

selects a link (e.g., icon 1344) to access the customer list.

The interface 1300 also presents a panel 1350 allowing a

user 1202 to access one or more links to merger-related views,

20   including an account assignment view 1355, an account executive

(AE) management view 1360, and a profile management view 1365.

Other linked views can include a schedule rollout view 1370, a

cross selling planning view 1375, a rollout management view

1380, and a view 1385 for monitoring the merger process. The

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panel 1350 also allows the user to perform a search 1390, and
perform a number 1392 of other merger-related actions 1395.

The interface 1300 also includes a tool to model a "clean
room" environment 1317 during the merger process 1100. The

5   clean room concept typically involves members of the involved
organizations physically meeting in a room and exchanging
information and objects. Typically, only the members of a clean
room environment can view and examine the confidential and
privileged information of other merger organizations. If the

10   merger deal is unsuccessful and the merger deal fails, then the
clean room members often leave their organization for reasons of
conflicts of interest, or are transferred to other parts of
their organization where they will not be interacting with the
other merger organizations.

15   As shown in FIGS. 6 and 10, a graphical user interface is
adapted to display customer account information for at least one
of the organizations. The graphical user interface can include
a menu that is adapted to display one or more views relating to
account assignments, decision threads, and account details.

20   The graphical user interface can further include an account
identification number, a customer contact, a customer contact
electronic mailing link, a measurement for an account impact,
and an account assignment view. The account assignment view can
include an assignment type, a selector relating to an account

lead, and information relating one or more account executives. The account executive information can include at least one of a length of tenure, a notable achievement, a list of assigned accounts, and information relating to a management stakeholder.

5   The list of assigned accounts can relate to at least one of the account executives, in which the list of assigned accounts can comprise assigned accounts, assignment information, and a text box.

As shown in FIGS. 7-11, a user interface includes

10   information relating to consolidating accounts for at least one of the merger organizations. The user interface can include a pull down window, a text box, a trigger date, and a response date. The user interface can also present a template including a notification template menu, a list of action items, and an

15   owner relating to each action item in the list.

The list of action items can include at least one of an account executive assignment notification, an account executive personalized communication, a customer communication, a cross selling opportunity, and a retention plan. The action item can

20   comprise a transmission of an email.

FIG. 7 presents an interface 1400 that allows a user 1202 to consolidate accounts 1315 in the sales task force menu 1208. The user 1202 can select to view a schedule rollout view via link 1370. The user 1202 can also view a schedule rollout

template 1420 from a template format in a pull down menu 1425.
The user 1202 examines a status 1431 of an action item 1432. A
status indicator 1431A (e.g., an "X" indicator) signifies that
the action has not been completed. The user 1202 can perform an

5   action 1435, such as automatically sending an email 1437 and
defining a template 1438. Additionally, an owner 1433 and a due
date 1434 of the action item 1432 can be presented. The
interface 1400 also facilitates exception handling 1436 for the
action items 1432. Some exemplary action items 1432 include

10   notifying an account executive (AE) of an assignment 1440,
facilitating AE personalized communication 1442, and conducting
customer communication 1444. Other exemplary action items 1432
involve a cross-selling opportunity 1446 and a retention plan
1448.

15   FIG. 8 presents an interface 1500 in which the user 1202
can select to notify an AE of an account assignment 1440. A
notification template 1445 and a template format in a pull down
window 1447 is presented. A message can be entered in a text
box field 1460. The user 1202 can then send the assignment

20   notification 1440 to one or more stakeholders shown in a pull
down menu 1470. The notification 1440 can include a trigger
date 1464 and a response date 1466. The interface 1500 also
facilitates exceptions 1468 to the notification 1440, such as
sending an alert email 1472, 1475.

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FIG. 9 presents an interface 1600 that facilitates action

planning 1605 for one or more accounts. The interface 1600

includes a panel 1620 for an assimilation of action items 1632.

The panel 1620 presents a status 1631 and an action type 1635

5   for each action item 1632 including an action type 1635 for

automatically sending an email 1637. The panel 1620 can also

include a template 1638, an owner 1633, a deadline 1634, and an

exception handler 1636. Some exemplary action items 1632 can

include account consolidation and assignment 1640, AE

10   personalized communication 1442, and customer communication

1444. Other action items 1632 include cross selling

opportunities 1646 and a retention plan 1448. The panel 1620

presents a graph 1625 of action items 1632, a list 1627 of

action items 1632 or both graph 1625 and the list 1632 of action

15   items 1629.

FIG. 9 additionally presents a panel 1640 for account

consolidation and assignment. The panel 1640 presents a

notification template 1645 and a template format in a pull down

window 1647. A message or description can be entered in a text

20   box field 1660. Account notification can be sent to one or more

stakeholders listed in a pull down menu 1670. The notification

includes a trigger date 1664 and a response date 1667. The

interface 1600 facilitates exceptions 1668, such as sending an

alert email 1672, 1675. Furthermore, the interface presents a

number 1682 of consolidated or addressed accounts, and present a link 1684 to an account consolidation view.

An account consolidation interface 1700 in FIG. 10 can be presented from the link 1684 in interface 1600 in Fig 9 or the

5   interface 1700 can be presented from selecting an account 1332 in the account list 1333 in FIG. 6. Panel 1316 in interface 1700 can present similar account consolidation information as shown in the account list 1333. A user 1202 can select an account title 1339 to present additional account detail 1339 in

10   another account panel 1732.

The panel 1732 shows the account 1339, an account identification number 1710, a customer contact name 1712, and an email link 1713 for the customer contact 1711. The account panel 1732 shows a tabbed menu for account assignments 1720,

15   decision threads 1727, and other account details 1725. The decision thread 1727 presents a log of a collaborative decision process in which merger managers can exchange ideas and communications. The tab 1720 selected and presented in the interface 1700 is the account assignment tab 1720.

20   The interface 1700 presents a current assignment type 1731 and allows the user 1202 to select a lead person 1735 for the account 1339. The interface 1700 allows the user 1202 to examine and comparatively inspect account information for at least two of the merger organizations 1330, 1340. The interface

1700 shows one or more details for executives 1338, 1348 of the account 1339 for one or more merger organizations 1330, 1340. For example, the interface 1700 shows a manager 1751, 1752 and a length of tenure 1777, 1779 for each account executive 1338,

5   1348. An account executive 1348 having a notable achievement 1741 as shown. A measurement 1746, 1781 for an impact the account 1339 has on income 1745 for each organization 1330, 1340 can be shown.

The interface 1700 can present a list 1757, 1783 of total
10   assigned accounts 1755 for each account executive 1338, 1348. Each list 1757, 1783 shows customer accounts 1760 with account values 1762 and assignment information 1764. Moreover, the interface 1700 can show a comment 1772 text box 1770 for a user to add comments 1774. The text box 1770 can have a link 1776
15   for discussed contacts.

FIG. 11 presents an interface 1800 for stakeholder user 1202 for sales integration 1815 in the sales task force menu 1208. The interface 1800 facilitates action planning 1605 for one or more accounts, as shown in interface 1600. The interface
20   1800 presents a Gantt chart 1830 of the assimilation actions 1632. The Gantt chart 1830 presents a time period 1835 for each action 1632. The stakeholder 1202 can inspect the status 1631 of the action items 1632 to ensure customer satisfaction. The stakeholder 1202 can also contact a number 1842 of other sales

task force members 1840, and access a number 1852 of actions 1850, such as managing templates 1855 and profiles 1857.

FIG. 12 presents an interface 1900 for a stakeholder 1902 to access a menu 1908 for employees with a panel 1920 for

5   merger-related questions and answers (Q&A) 1915. The Q&A interface 1900 allows merger organizations to address commonly asked questions from employees. The interface 1900 presents a central, integrated Q&A format to address common questions and reduce an amount of misinformation and confusion that can arise

10   during the merger process 1100.

The panel 1920 shows categories for various Q&A merger topics. As an example, some Q&A categories can include a business model and strategy category 1940, an organizational category 1950, a human resource and personnel category 1960, and

15   an integration team category 1970. The user 1902 can select a single category 1940 to view a number 1945 of listed questions 1947 for that category 1940. Additionally, the user 1902 can select a button 1935 to show all listed questions for all categories or select a button 1937 to hide all questions for all

20   of the categories. The user 1202 can further select a question 1947 to view a panel 1925 with a response or answer to address the question 1947. Employees to subscribe or unsubscribe 1927 can merger-related Q&A categories. The panel 1925 can be cancelled 1929 and closed by the user 1902. In the event the

employee stakeholder 1902 has other questions or desires other resources, the interface 1900 can provide a text box 1930 for searches and a link 1922 for help and reference views.

Other embodiments can be within the scope of the following

5   claims.